Management Information

Using Reporting Functions
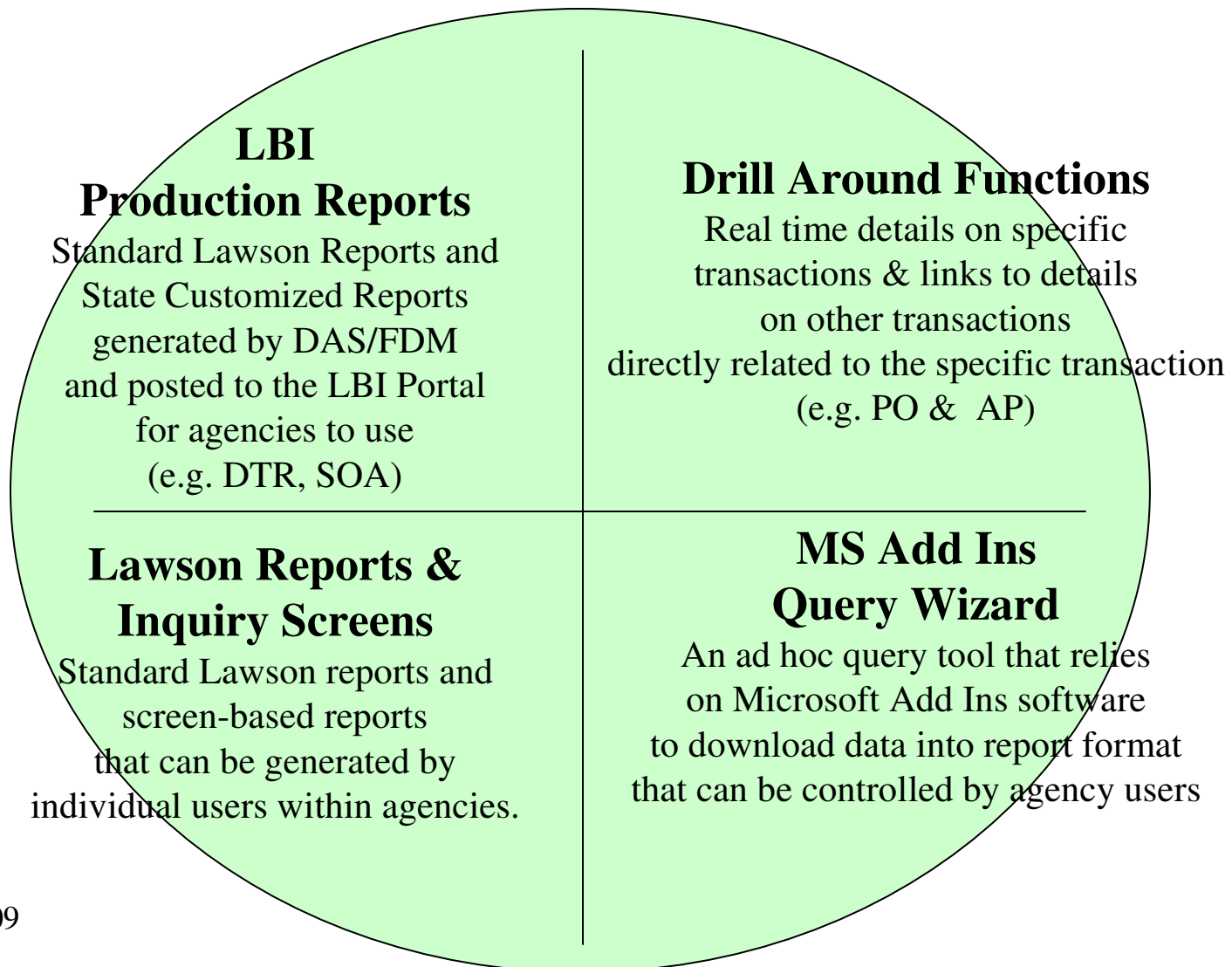## in NH FIRST

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Chapter 4: MS Add Ins & Query Wizard Functions

Introduction

This document is designed to support self-guided instruction on the variety of reporting functions implemented with NH FIRST.

The fundamental actions and navigation required to execute reporting functions should be familiar to users who have already attended training on specific processes.

**LBI
Production Reports**

Standard Lawson Reports and
State Customized Reports
generated by DAS/FDM
and posted to the LBI Portal
for agencies to use
(e.g. DTR, SOA)

Drill Around Functions

Real time details on specific
transactions & links to details
on other transactions
directly related to the specific transaction
(e.g. PO & AP)

**Lawson Reports &
Inquiry Screens**

Standard Lawson reports and
screen-based reports
that can be generated by
individual users within agencies.

**MS Add Ins
Query Wizard**

An ad hoc query tool that relies
on Microsoft Add Ins software
to download data into report format
that can be controlled by agency users

Chapter 4

Using the MS Add Ins Query Wizard to Extract Data from NHFIRST

What is the Query Wizard?

- Allows users to extract data from Lawson into Excel

- Provides users the ability to:

    - format data

    - set selection criteria

    - sort results

    - perform calculations

    - specify a worksheet for the output

Why should the Query Wizard be used?

- To define and create custom reports with live data

- To modify data, and then use the Upload Wizard to load those changes back into Lawson

What data is available from the Query Wizard?

• Allows users to extract both setup and transaction data from Lawson forms

• Query any data you seen on the form based on criteria entered (dates, transaction status, etc.)

• Can provide similar information to what was used previously with Crystal reporting, the e-info canned report, and e-info request services

How do I get access to the Query Wizard?

• Submit request form to include security access to Microsoft Add-Ins – Query Wizard

• Submit request to have Add-Ins installed on your PC

To Log into the Query Wizard

Open a new Excel spreadsheet and click Lawson, then Query Wizard
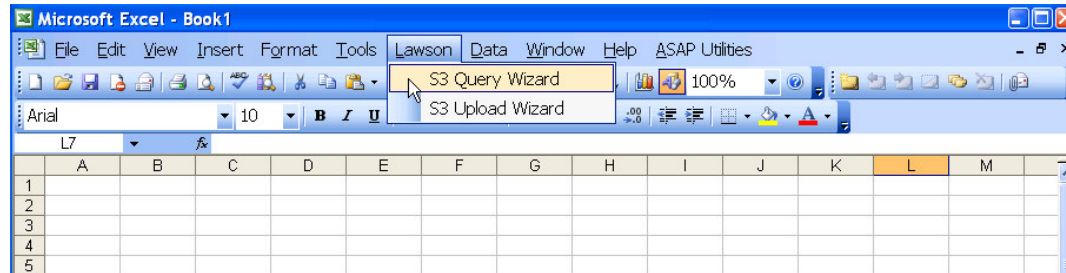
Login with your normal Lawson username and password and click OK

For PROD, the server is
http://prd.nhfirst.nh.gov

Querying Data from a Form

On the **Welcome** tab in the **Choose Query Source** box, click the **Application** radio button, and then click the **Next** button.

Application = Forms

Note: The Query Wizard will default to database tables, so be sure to click the Application button before continuing

Double click on a **Product Line** to display the available system codes.

In the live system, the product line should always be **PROD**

Double click on a **System Code** (i.e. Accounts Payable) to display the available forms

Double-click on the **Form** (i.e. AP10.1, Vendor) to select it for the query. The fields associated with the form will be displayed in the **Fields** area. Key fields automatically display in the **Selected Fields** area.

If you need to determine which fields to select, open the Lawson Portal and go to the form where the field exists. Click cursor on the field in a form and press the CTRL + Shift + O keys on the keyboard to display the coding for that field.

Table Prefix

Field Name

TIP: Match this code (f7) to the one on the field selection screen to find it more quickly

VEN-VENDOR-VNAME | Id=_f7 | KNb=03D | Type=text | Size=30 | Name=form

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Select the fields for the query by *double-clicking* or *dragging* the field to the **Selected Fields** column. To remove a field from the Selected Fields column, select it and click the Remove Selected Field button below.

Note: There is a limit of 100 fields to select

To change the order in which the fields appear, click to select a field name and then click in the position where the field should appear. Click the **Next** button when finished.
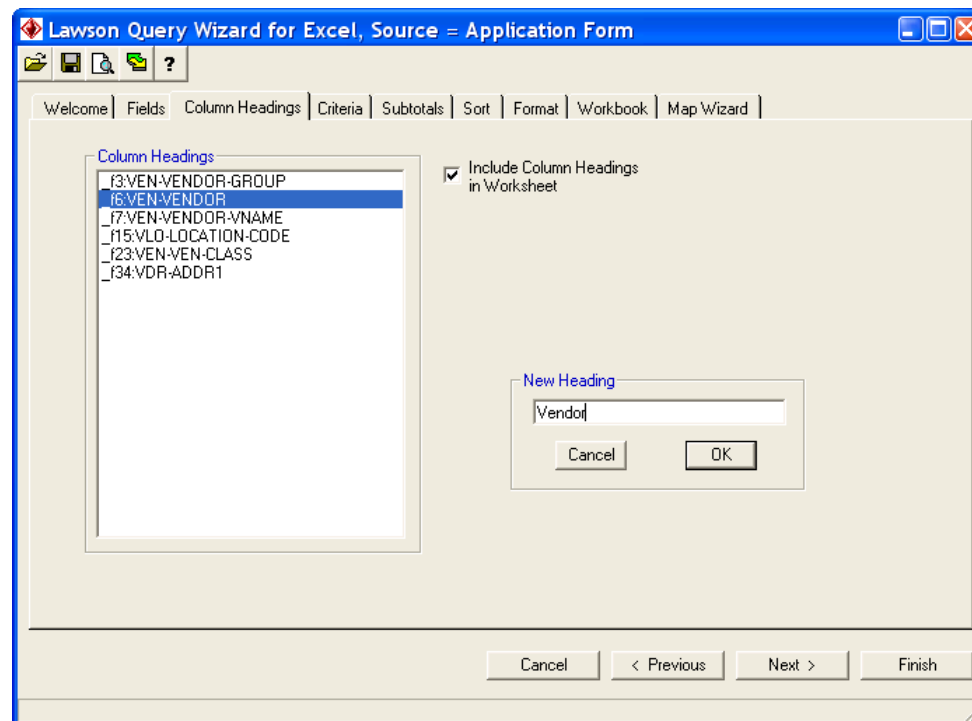
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To change the column headings that display in your query results, double-click the **Field**
name that should be changed and the New Heading field appears with the existing field
name. Enter the new field name and click OK.

Optionally, you can choose to not include column headings
in your worksheet by unchecking the check box above.
When finished, click the **Next** button.

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To narrow the results in your query to a certain vendor class, for example, use the criteria tab. In the **Set Key Field Values** area, enter the vendor class (EMP for employees) in the value field. Only employee vendors will be returned in the query.

Optionally, in the **Maximum # of records to return field**, enter a sufficient value.   The system defaults to 10. The maximum is 65,520. Click the **Next** button.

On the Subtotals tab, you may choose to use subtotals in your query. From the **At each change in:** drop-down list, select the record at which Excel is to calculate a subtotal. From the **Use function:** drop-down list, select the operation that Excel is to perform. In the **Add subtotal to:** list, select the field that the calculations to be performed on.

Note: This option may slow the query processing when processing for large amounts of data and may be completed in Excel after the query is completed.

You can also **sort** your query based on up to 3 different fields. Choose whether to view the data in ascending or descending order.

The query wizard also provides a formatting function, if desired. While this option is not often used in basic querying, it is possible to choose a title for the worksheet and set up the format for the worksheet. All of the standard Excel formatting options are available.
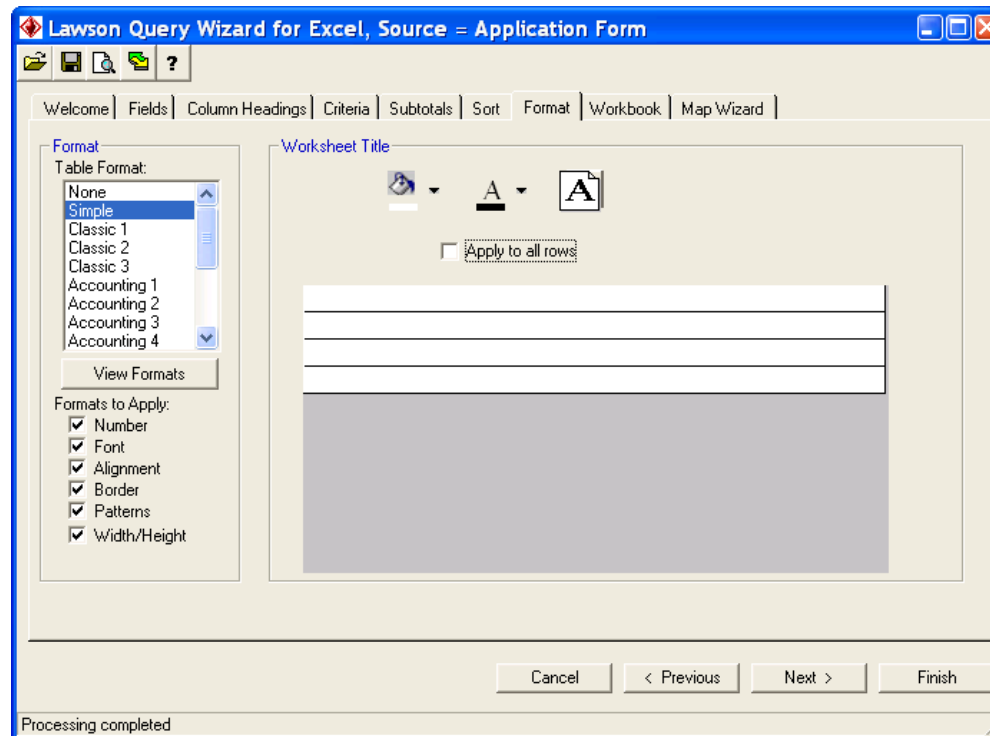
Select the **Workbook** tab. In the **Select Output Workbook** section, select **Load into Current Workbook** to send the data to a current, open workbook, this is the default. You can also define the **Starting Position** for the data in a worksheet. Select the **Clear Worksheet Before Send** checkbox to clear the contents of the sheet before querying the data.
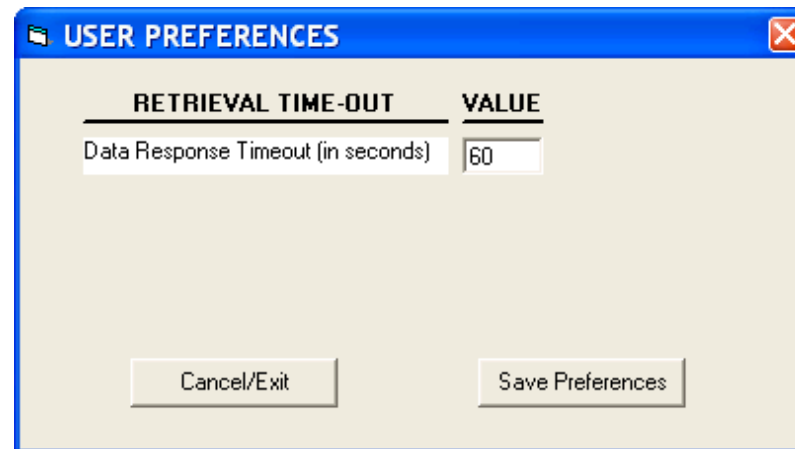
Before executing the query, click the double green and yellow arrows and verify the retrieval time-out period. Not having enough time allotted may be a factor in receiving incomplete data. Consider setting up the value to 300 seconds or so and verify this allows enough time to capture the full amount of data.   Then, click **Finish**. Your query results will populate in your workbook and the Query Wizard will be minimized.

Important: The query will overwrite anything in the current Excel spreadsheet. It is recommended that you save your work and close any other spreadsheets that are open on your PC.

To save your query for future use, click the Save 🖫 icon. Name your query and save to the desired location. To reopen a query at a later time, you must first open the query wizard, then use the folder icon 📂to open your query.